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Executive Director

REPORT

ON THE

SAN JUAN UNIFIED SCHOOL DISTRICT

JANUARY 1982

A
REPORT
ON THE
SAN JUAN UNIFIED SCHOOL DISTRICT
PREPARED BY
THE COMMISSION ON CALIFORNIA STATE
GOVERNMENT ORGANIZATION AND ECONOMY

JANUARY 1982

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January 21, 1982

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Executive Director

Honorable Edmund G. Brown Jr.
Governor of California

Honorable David A. Roberti
President pro Tempore of the Senate
and to Members of the Senate

Honorable Willie L. Brown, Jr.
Speaker of the Assembly
and to Members of the Assembly

Dear Governor and Members of the Legislature:

The State's K-12 public school system constitutes the largest single spender of taxpayers' funds. This year, over \$12 billion are budgeted for local school districts. The State's share for this purpose will be over \$7 billion. Approximately 33 cents of every dollar of tax revenue of the State goes to the local school districts. The Commission is convinced that these dollars can be spent more effectively than has been done in the past.

Because of these large sums of money and concern over efficient use of the money, the Commission, since 1973, has been studying various aspects of (K-12) school operations. In that year, the Commission became alarmed at the decline in enrollment in California's schools and the resulting under-utilization of school facilities. In 1978, the Commission issued a report specifically addressing property utilization practices in the face of an enrollment decline of 300,000 since 1970. The 1978 report also publicized the existence of a huge backlog of deferred maintenance, in excess of \$750 million at that time. In June of this year, the Commission released a report citing serious deficiencies in the management of the Los Angeles Unified School District.

It is imperative that the State, through legislation and executive leadership, emphasize and give high priority to attaining a higher level of operating efficiency in the local school districts. In the past decade, the major thrust of legislation has been to identify and address special needs of children through special funding of various categorical programs. With the severe strain on State revenues, there is now both an urgent need and an opportunity to encourage local school districts to look at ways in which these services can be delivered more effectively and efficiently.

Honorable Edmund G. Brown Jr.
Honorable David A. Roberti
Honorable Willie L. Brown, Jr.

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Our recently completed study of the San Juan Unified School District in Sacramento County found substantial improvements and cost reductions in the District's business operations. Moreover, the District is already embarking on further improvements.

While the focus of our study of the San Juan District was on the business operations, sufficient data was collected to strongly suggest that the educational program of the District has not suffered appreciably due to the limited availability of funds in recent years. Over the last decade, District enrollment has dropped from 54,000 to 45,000, a decrease of over 8,500 or 16 percent; while teaching and support employees increased from 3,100 to 4,100, a 32 percent increase.

The increase in employees is almost totally attributable to new federal and state programs. District officials believe that the regulatory requirements that accompany these new programs limit their ability to make the most cost effective use of these resources. More flexibility in using these resources to address the special needs of low achievers may have more impact on results than would additional dollars.

This report on one facet of our study of education is transmitted for your information. A more complete report with recommendations will be transmitted to you following the completion of our study of the State Department of Education early this year.

Respectfully,



NATHAN SHAPELL, Chairman

James F. Mulvaney, Vice Chairman
Senator Alfred E. Alquist
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Senator Milton Marks
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I. SUMMARY OF FINDINGS AND RECOMMENDATIONS

The San Juan Unified School District is one of the larger school districts in California. The district covers an area of 75 square miles in Sacramento County just east of the City of Sacramento. The area is urban, with a mixture of commercial and residential property. Current district enrollment is 45,095 students. (See Attachment A for additional operating characteristics.)

When compared to other school districts studied by the Commission since 1973, the San Juan District is exceptionally well-managed and operated. Three years ago the Board of Education was in turmoil, embroiled in recall elections, and in continual disruption and open antagonism. Today, the Board works in harmony--if not always in agreement--and has emphasized an open and responsive approach to citizens' interests and views.

At the public hearing where San Juan officials testified on the business and financial management of the district, the Commission members were impressed with the policies established by the Board of Education, the leadership it provides, and the quality of the district's administrative management. The members commended Naida West, President of the Board of Education, Stan Nielson, Clerk and member of the Board, and Superintendent Fred Stewart for their frank and responsive answers to questions by Commissioners.

The Board has placed major emphasis on involving parents and teachers in decision-making. To provide structured community input, it has established six citizen advisory committees, ranging from the school budget to pupil behavior and discipline. More important, it makes active use of these committees by constant referral and requests for review and comment on problem issues as they arise.

The present superintendent, Dr. Fred Stewart, was appointed to his position in August 1979. Since that time he has developed a generally open and participatory management environment. He has surrounded himself with an excellently qualified and capable management team. During the Commission's study, the Commission and its staff were especially impressed with the openness and positive attitude of the Superintendent and his staff.

This does not mean that the San Juan District does not have problems. Like many other school districts, it is experiencing declining and shifting enrollment and increasingly severe funding limitations. The major finding of the Commission is that the San Juan Board and administration have recognized the problems and have worked to develop the organization and implement the necessary managerial systems to attack and resolve their problems. The problems are serious, but the district has made commendable progress and is continuing with a systematic program of goals and objectives to make improvements. The essence of the Commission's recommendations to the district can be summarized in one phrase: Continue to do what you are doing.

Following is a summary of the Commission's findings and recommendations listed according to functional area. In some areas, where the district's efforts are obviously adequate, no recommendation is made. Chapters II to XI present more detailed descriptions of district operations in each functional area.

Consolidation of Schools

Since 1970 enrollment has dropped from 53,000 to 45,000, a decrease of 16 percent. As a result, the district has been confronted with many under-utilized school sites.

In October 1978, the Board of Education adopted a policy "Governing the Reappraisal of the Use of School Facilities," which required reappraisal of all school facilities annually and outlined solutions for both underenrolled and overenrolled schools. In May 1980, the Board directed staff to initiate a consolidation study of 25 schools in the western portion of the district where enrollment was declining. The project was completed in August 1981, culminating in closure of four schools and conversion of a fifth to a Pre-School/Child Care/Special Education Center.

The study was carefully planned and extremely thorough. District officials developed excellent evaluation procedures and provided for extensive community involvement. Unlike the reaction in some other districts, the response of both parents and teachers has been positive and supportive.

Savings through closing the schools are estimated at \$450,000 for the 1981-82 fiscal year. In addition, the district will receive revenue when the sites are leased or sold. Present market value of the four sites is estimated at \$2,275,000.

Despite the closures, the district still faces serious under-utilization problems. A task force is continuing to work on solutions. Its report is scheduled for completion early in 1982.

Recommendation 1

This recommendation is not directed to San Juan officials, but to officials in other school districts who are experiencing declining enrollment and as a consequence are confronted with the problem of underutilized facilities. These officials should obtain copies of the San Juan planning and procedures documents which the district used to close five elementary schools.

Other districts may alter the strategy or change some criteria and procedures, since circumstances are bound to be different in different districts. Nevertheless, the care and skill with which San Juan planned its closures, developed its criteria, and carried out its evaluations should provide other districts with valuable information on closing and consolidating under-utilized schools. In particular, the information should help other districts to avoid the negative response and active opposition that a number of districts have recently experienced in attempting to close schools.

Recommendation 2

This and the following recommendations apply to San Juan District officials.

Continue the analysis of underutilized school facilities using the methodology established in closing the elementary schools. Action on improving utilization of high schools is particularly urgent. At the same time, since excess capacity has been reduced from 21.5 percent to 12.1 percent, care

should be taken not to sell facilities which may later be needed. Where demographic projections indicate that additional facilities will be needed in the late 1980's and 1990's, leasing currently unused facilities offers an opportunity for increasing revenue and at the same time protecting current investment for future requirements.

Relief Measures for Overenrolled Schools

While enrollment in the southwest area of the district has declined, enrollment in the northeast has increased, leading to seriously overcrowded schools.

Since 1980, the Board has used funds from various sources, including impact funds levied against developers of new subdivisions, to construct new facilities and add portable housing at overenrolled school sites. It has also changed school boundaries, bused children to less crowded schools, and taken other measures to relieve overcrowding.

Most recently, the district is working to complete an application for state funds under the provisions of Assembly Bill 8. Final state approval is scheduled for May 1982.

Executive Planning and Direction

The new Superintendent has developed a generally open and participatory management environment. The management system stresses formal written goals and objectives with time lines and evaluation of products.

At the beginning of each year a detailed goals and objectives report is compiled for each department in the Business, Personnel and School and Instruction Divisions. At the end of the fiscal year, corresponding reports are issued evaluating the degree of attainment achieved for each goal and its associated objective and activities.

In the personnel area the district has placed heavy emphasis in the last two years on improving performance evaluation, refining recruitment and selection of substitute teachers, and expanding its affirmative action program.

Operational Planning and Budget Development

By order of the Board, the staff has made a major effort in the past two years to simplify budget documents and increase their clarity. The Board has invited broad community participation in the budget planning process and has emphasized an open book policy.

Reviewing the 1981-82 budget submitted by Superintendent Stewart, the Board made budget cuts amounting to \$3 million. Altogether, the budget cuts resulted in the elimination of 96 employee positions--8 management, 16 certified (teachers) and 72 classified (non-teachers, i.e., instructional aides, health assistants, accountants, clerks, craftsmen, custodians, bus drivers, and food service workers).

This year, the district negotiated salary increases of 6.75 percent for both certified and classified employees. The increases will cost the district \$4.96 million. As a result of the budget cuts, however, the total increase in the 1981-82 budget over 1980-81 actual expenditures is \$4.1 million, or 3.7 percent. A national economic forecasting firm has estimated that state and local governments generally will experience price increases of 8.6 percent during fiscal year 1981-82. By this measure, the increase in the San Juan School District budget is five percentage points below expected inflation levels.

Although enrollment has decreased by over 8,000 students since 1970, total employees have increased from 3,100 to 4,100, an increase of 32 percent. Explaining this apparent contradiction, the district states that despite the decrease in enrollment, the workload in San Juan, and in all school districts in California, has increased rather than decreased. The workload has increased because of the massive expansion in recent years of special educational programs mandated by the federal and state governments, in particular programs for the educationally disadvantaged and the poor.

Recommendation 3

In developing the final budget, continue the practice of requesting the Superintendent to submit to the Board of Education a list in priority order of budget reductions which he recommends and an additional list which he does not recommend. Since the Legislature does not adopt the state budget until close to the end of the fiscal year in July, the Board does not have an exact projection of funds available at the time when the Superintendent submits his Tentative Budget in June. The reduction lists give the Board time to review and decide on which cuts can be made with the least harm to the quality and level of educational service if state funding is less than expected.

Recommendation 4

Continue the program of simplifying and clarifying budget documents. Expand explanatory comments, in particular on those items where substantial increases or decreases have occurred in comparison with prior year expenditures. Where legally required budget titles are not clear for a class of expenditure, explain the actual nature of the item in parentheses or in a footnote. For example, the item Travel and Conferences increased in 1981-82 by \$108,000, to reach a level of \$450,000. Both the increase and the total seem extravagant for a public agency of 4,000 employees until one understands that most of this expense is for reimbursement to special teachers, teachers' aides, counselors, consultants, and other employees for travel within the district, rather than travel outside the district to educational conferences.

Management Information System

The district has a batch driven, automated management information system, with equipment operated on a three-shift, five-day week.

In 1980 the district issued an RFP to provide additional capacity and an interactive capability. The new computer is scheduled to go on-line in the first quarter of 1982. The district has a five to seven year plan of implementation to cover all automated information requirements.

The new capability will provide management with more timely information on student and employee records, encumbrances and expenditures, equipment and facilities maintenance, and pupil transportation. The goal is to reduce hardware, software and maintenance costs by 25 percent, now at a level of approximately \$1.74 million.

Recommendation 5

Before the new Univac computer goes on-line in the first quarter of 1982, develop systematic control, evaluation, and trade-off procedures to insure that the increased data processing capability is applied to information requirements which promise the highest cost-benefit returns.

Expenditure Control and Reporting

In 1980-81, the district initiated an extensive campaign to tighten control over expenditures.

The district now uses a basic encumbrance procedure which requires all purchases to be posted against budget allotments prior to issuance. In April 1981, the administration implemented a new automated system for payroll and personnel information. The new system combines all information in one file, provides easy access and change capability, and insures that the information on each employee is not contradictory.

Developing accurate reporting of average daily attendance figures (ADA) is extremely important to any local district. State funding allocations for regular classroom teaching, as well as for many of the special educational programs, is based on ADA. For 1981-82, with the new computer due on-line in the first quarter of 1982, the district has set as a major goal the automation of attendance at all K-6 and 7-8 schools.

As a result of the public auditor's report of 1980, the district has initiated a program to tighten up and reduce the investment in inventories by 50 percent. The audit report cited no exceptions to responsible accounting of district funds.

Maintenance and Operations

One of the major items involved in cutting the 1981-82 budget by \$3 million, was reducing custodial service to every other day cleaning. This action eliminated 50 custodial positions. Savings are estimated at \$661,000 annually.

The district has a backlog of deferred maintenance of \$18 million. The annual allocation in recent years has been around \$260,000. The district has conducted a survey of unused property and has identified 191 acres of excess land at 54 school sites. The property has an estimated value of \$5.7 million. The district is now identifying those parcels which can be sold. The revenue will be used to reduce deferred maintenance and to help bring it under manageable control.

Recommendation 6

Investigate the savings potential in contracting with private firms for such services as security, custodial, maintenance and food services.

Transportation

The district commissioned a pupil transportation study in 1981 by Price Waterhouse Company and Edgar Management Consultants. The study recommends changes in routing, corner stops, vehicle replacement, parts inventory control and fringe benefits. It also recommends initiation of a parent pay program. Savings are estimated at \$450,000 to \$900,000. Most of the savings would be realized from the parent pay program. These savings may not be achieved, however, since existing state law allowing parent pay is scheduled for sunset in June 1982.

Collective Bargaining

Both district and union officials report that management-union relations and communication have improved significantly in the past two years. The district has encouraged participation by employees and their representatives in policy formulation, budget development, and personnel procedures. Union representatives sit on the Superintendent's cabinet, together with the President of the PTA Council and district officials.

The district stresses mutual problem solving in the negotiating process.

Despite improvement in management-union relations, the negotiating process remains a high risk area for management-employee conflict and work stoppage. Until the state budget is adopted--usually only days before union contracts expire--neither management nor the union is in a position to reach agreement, since they do not know what funds are available.

As a consequence, negotiations in past years have rarely been smooth. In 1977 teachers struck for four days. This year the contract was settled before the school year began--the first time since 1977.

Recommendation 7

Continue the program of mutual problem solving in management-union relations. Expand it to all areas where it promises to be effective in reaching mutually satisfactory agreements in contrast to the adversary proceedings of the bargaining table.

Community Involvement

The district stresses formal community participation in all of its activities. To provide structured community input, the Board has established six citizen advisory committees. The Board also appoints ad hoc committees from time to time on particular programs; e.g., Graduation Requirements Committee.

A Principals and Presidents Council, consisting of the ten high school principals and presidents of the PTA or Parents Club, meets monthly to review

problems, make recommendations, and prepare presentations to the Board of Education. An Intermediate Schools' Parents and Administrators Council performs a similar function for 7-8.

The Superintendent is a member of the PTA Council, regularly attends its monthly meetings, and is often on the agenda. The Associate Superintendent meets each Friday with parent representatives from all schools located within the attendance area of two high schools.

Recommendation 8

In the November election, three new members were elected to vacancies on the San Juan School Board. The new trustees, in conjunction with the two current trustees, should continue the district's emphasis on community involvement.

Virtually all authorities on education agree that the gravest problem facing public education today is the growing disillusionment and disparagement over the quality of education provided by our tax-supported schools. More and more we read reports of confrontations between taxpayers and school administrators over financial support of the public schools. In some cases--most recently in Michigan--school districts have been forced to close down.

During the course of our study, Peggy Dial, President of the San Juan PTA Council, and others told the Commission that the district had strong support and approval from parents and the community. They attributed the positive response to the concentrated effort the district has made to communicate with and involve the community in its decisions and daily operations. Our concluding recommendation is based on this finding. No other area, perhaps, is more important to maintaining and improving the quality of a district's educational services.

II. CONSOLIDATION OF SCHOOLS

The Problem

Like many school districts in California, San Juan has experienced declining enrollment. Since 1970 enrollment has dropped from 53,000 to 45,000, a decrease of 16%. As a consequence, the district found itself with many under-utilized school sites.

Enrollment is not only decreasing, but is also shifting. While the western end of the district has remained stable, the eastern end has experienced heavy growth in both commercial and residential construction. The result is under-enrolled schools in the western area and over-enrolled schools in the eastern area.

Since 1964 the district had closed six elementary schools, sold one and converted the other five to an adult education center, continuation school, vocational arts center, and two special education centers. In spite of these closures in the western portion of the district, over 130 classrooms in twenty-five K-6 schools were not being utilized for regular education programs. The result was several very small elementary schools with enrollment of approximately 200.

Reappraisal of School Facilities - Initial Actions

Recognizing the problem of declining enrollment, the Board of Education in September, 1977, initiated a program called "Reappraisal of School Facilities." The Board emphasized that the responsible administrative staff should work intensively with the community in developing the program. This broad-based effort led to the adoption in October, 1978 of a policy, "Governing the Reappraisal of the Use of School Facilities." The policy required reappraisal of all school facilities annually and outlined solutions for both underenrolled and overenrolled schools. "When it is determined," the policy begins, "that a school's educational program will be adversely affected by overenrollment or underenrollment; or, when it is determined that additional funding will be necessary to maintain the educational program, the administration shall consider alternative solutions and recommend action to the Board."

The statement sets an enrollment of 250 as the level for considering closure of a K-6 school, 500 for closure of a 7-8 school, and 1400 for a 9-12 school.

The principal solutions outlined for under-enrolled K-6 schools were:

1. Combine two or more schools to create enrollments large enough to support a traditional program, and sell or lease vacated sites.
2. Combine schools and develop magnet school programs in vacated schools with open enrollment. Such schools could attract students from the eastern end and so reduce some of the overenrollment in that area.

For 7-8 and 9-12 schools the principal solutions are:

1. Develop joint use agreements with a suitable public or private agency.

2. Make boundary adjustments to bring enrollments within desired range.
3. Provide open enrollment to smaller schools.
4. Close small schools and reopen closed schools for alternative program uses (i.e., back to basics or magnet schools) and provide open enrollment to these schools.
5. Close small schools and sell or lease vacated sites.

Following the adoption of this basic policy, the district's Planning Department developed a Long Range Facilities Study and demographic pupil projections for the district. Released in July 1980, it identifies the district's housing needs through the year 2000. The study shows that student population would bottom out during the 1982-83 year with a gradual increase projected in the subsequent decade. This study demonstrated that a number of small elementary schools would not be needed by the district for the next approximate 20-year period. Consequently, one of the major recommendations in the report is that the district should conduct a school consolidation study of all schools in the western area during 1980-81 for implementation in 1981-82.

Conducting the Consolidation Study

On May 27, 1980 the Board directed the administration to study 25 elementary schools in the western area out of the 53 districtwide elementary schools. The project was completed August 11, 1981, culminating in closure of four schools and conversion of a fifth to a Pre-School/Child Care/Special Education Center.

The study was extremely thorough, developed excellent methodology, and provided for extensive community involvement. The administration formed a Consolidation Task Force of school officials, which developed an overall process and timeline for conducting the study together with comprehensive criteria for assessing each facility. Each of the 25 schools formed a school appraisal team consisting of the principal, a parent representative and a staff representative; each of the three individuals came from different schools. Each school appraisal team was trained and then appraised three of the schools under study (but not their own school) utilizing the criteria developed by the Consolidation Task Force.

The teams graded each school on seven separate factors--program offerings, program flexibility, instructional space, support space, play areas and equipment, environmental conditions, and the appearance and condition of buildings and grounds. The district supplied factual data on operating characteristics, such as per pupil costs, actual enrollment, projected enrollment, school capacity, deferred maintenance, and transportation.

The overall process, timeline, and assessment criteria were reviewed and approved by the Board of Education before each sequential step was implemented by the administration.

The Consolidation Task Force of school officials then conducted pro-con analyses which reduced the candidates for closure to eleven schools. These were reviewed a second time and the number was reduced to eight. Between

February 19 and March 2, 1981, the district held public hearings at each of these schools. Comments from both parents and teachers were documented in detail and reviewed. From this list of eight, five schools were identified for consolidation based on all of the criteria that had been utilized, including the ability of nearby schools to absorb the student enrollment and the additional costs of transporting students to their new location. The task force then made its final decision to recommend closure of four schools and convert a fifth to a Pre-School/Child Care/Special Education Center.

The recommendation was reviewed by a citizens' committee appointed by the Board on facilities and transportation. After conducting two public hearings on the closure, the Board voted unanimously to approve the task force recommendation.

The effect of school closure on the district's excess capacity to house students is shown in Attachment A. Before closure the district had excess capacity for 12,076 students, or 21.5 percent. After closure the excess capacity dropped to 6,074 or 12.1 percent.

Savings and Revenue

Savings are estimated at \$450,000 for the 1981-82 fiscal year. These are operating savings. They result from reduction in staff salaries and in supplies, maintenance, utilities and insurance costs. Staff reductions include principals, secretaries, media technicians and custodians. They do not include teachers, who move with the children to other schools.

In addition, the district in time will realize increased revenue from the lease or sale of the four closed sites. One appraiser has estimated conservatively that the fair market value is \$2,275,000. The estimate is based on zoning codes now in effect in the areas where the schools are located.

Because of restrictions in state law, however, the district may have difficulty in selling the sites for a similar amount or leasing them based on a similar value. The law requires that after declaring the property surplus, the district must first offer the sites for sale or lease to public agencies and non-profit institutions. State law also requires that if the property was purchased from a private owner, he has the privilege of buying it back at fair market value. These restrictions obviously limit the district's flexibility in obtaining the highest competitive price in the open market place.

In addition the County Board of Supervisors is considering a proposed ordinance which would require that school property can only be zoned for public use. If the ordinance passes, the district could perhaps apply successfully for rezoning, but clearly the ordinance poses one more threat to the district's receiving a fair market value for its property.

Recognizing these complications, the Board in August, 1981, approved the Superintendent's recommendation to hire the firm of Gary Gillmor and Associates to provide consultant services in leasing or selling the four unused sites.

Community Response

Despite the fact that district documents show that parents, as well as teachers, were overwhelmingly opposed to closing the five K-6 schools, the district received very few complaints over the closures. The response of both parents and teachers has been positive and supportive. This reaction is in sharp contrast to a number of other districts, where opposition to closure was intense and highly vocal, including initiation of recall movements and filing of lawsuits.

Naída West, President of the Board of Education, attributes the smooth transition to five factors.

1. The comprehensive and rigorous planning of the study by the Consolidation Task Force.
2. The extensive involvement and communication with parents and teachers.
3. The positive campaign conducted by the Board of Education and the administration to educate and persuade parents that consolidation of schools would improve the quality of education and enable the district to provide students at the closed schools with more comprehensive and flexible programs.
4. Explicit statements by district officials at the public hearings that they had received legal advice indicating that neither an environmental impact report nor a negative declaration were required for school closure. A "categorical exemption" filed with the County Supervisors would suffice. The Board has the responsibility and authority to close schools it deems necessary.
5. The policy established by the Board that the eventual disposition and use of closed schools was a separate issue and would be dealt with after the schools were closed. This action averted any opposition to closure which might have been generated through disagreement over the details of disposition.

Future Plans

Despite the success of the 1981 closure program, the district still faces serious under-utilization problems. Attachment B shows that several K-6 and 7-8 schools are either below or approaching the minimum enrollment level.

The situation is even more serious with high schools. (See Attachments B and C). Since 1975-76 high school enrollment has dropped from 17,970 to 14,388, a decrease of 20%. As a result, enrollment at five of the district's ten high schools is below the district's minimum criteria level.

The district has recognized the need for continued action, and has reactivated the School Consolidation Task Force to study the problems and recommend solutions. Its report and recommendations is scheduled for completion in February or March, 1982.

III. RELIEF MEASURES FOR OVERENROLLED SCHOOLS

Reappraisal of Overenrolled Schools

While enrollment in the southwest area of the district has declined, enrollment in the northeast has increased, leading to seriously overcrowded schools. As with under-utilized facilities, the 1980 policy statement governing reappraisal of facilities, also recognized the problem of overenrollment. It sets enrollment criteria for identifying overenrolled schools and outlines solutions to reduce the impact. It states that alternative solutions will be explored when the projected enrollment of an elementary school approaches 600 or when the projected enrollment approaches the program capacity of the school. For 7-8 schools the criteria level is 900, and for 9-12 schools it is 1800. Recommended solutions include the following:

1. Add portable instructional and support facilities and staff.
2. Change boundaries.
3. Initiate year-round operation.
4. Bus students to less crowded schools.
5. Encourage open enrollment.

Impact Plan and District Actions

The Planning Department's Long Range Facilities Study of 1980 developed a detailed plan applying these measures to the overenrolled schools in the east portion of the district. The department estimated that building funds needed to mitigate overenrollment at impacted schools amounted to \$2,275,000. Funds available from such sources as the building fund, impact funds, fire insurance fund and general fund amounted to \$2,434,737. This plan, with some revisions was approved by the Board of Education and by the County Board of Supervisors, who must approve impact fee levels levied against developers. These funds have been used or are being used to construct permanent facilities or add portable facilities at approximately 15 over-enrolled schools in all three divisions. As a result, impact problems have been reduced and the district has been able to avoid double sessions.

Future Planning and Action

Nevertheless, on the basis of the district's criteria, nine to ten K-6 schools, three 7-8 schools, and one 9-12 school are overenrolled or approaching overenrollment. (See Attachment B) In addition, a new subdivision on the far east side of the district is currently under development. Approximately 40 percent of the subdivision, called Natoma Station, is now within the district. The Superintendent, however, has recommended that the district annex the remainder in order to increase funding from the state for average daily attendance (ADA).

The Long Range Facilities Report estimates that the 3,276 housing units planned for construction by 1990 will generate 591 K-6 students, 458 7-8 students, and 508 9-12 students in the next 15 years.

In addition to the district's own actions, a slowdown in home construction in the past two years has reduced the district's impact problem. Nevertheless, the district still has overenrolled schools and anticipates that new facilities will be needed in the future to keep the impact problem under control. For this reason, last year it set as one of its principal goals the development of site master plans for those sites where development is anticipated in the next two years. For 1981-82 the district is concentrating on three major goals.

1. To revise and update the 1980 long-range facilities study, including problem solutions and strategies.
2. Complete the impact application plan. At this time the facilities construction program is supported solely by impact fees. Portable relocation and purchases for the 1982-83 school year will require continued revenue from this source.
3. Complete application for AB 8 construction funds. In addition to impact fees, the district needs state funding to meet its needs for facilities. The application requires approval of justification by the State Department of Education and approval of funding level by the State Allocation Board. The schedule for final approval is set for May 1982.

IV. EXECUTIVE PLANNING AND DIRECTION

Superintendent Stewart was appointed to his position in August 1979. Since that time he has developed a generally open and participatory management environment.

Goals and Objectives

The management system stresses formal written goals and objectives with time-lines and evaluation of products. At the beginning of each fiscal year, two goals and objectives reports are compiled and issued, one for the Business and Personnel Divisions, and a second much larger report for the School and Instruction Division. The goals and objectives are set forth in detail for each department in the division, including the activity product expected, the person(s) responsible, and the date scheduled for completion. Attachment D shows the overall goals and objectives for the Business and Personnel Divisions for 1981-82. Attachment E shows a typical page of the detail, in this case one of the goals for the Budget Development and Control Department.

At the end of the fiscal year, two corresponding reports are issued evaluating the degree of attainment achieved for each goal and its associated objective and activities. Attachment F shows a detail page in the 1980-81 report for the Data Processing Department.

Performance Evaluation, Selection of Substitute Teachers and Affirmative Action

In the personnel area, the district has placed heavy emphasis in the last two years on improving performance evaluation, refining recruitment and selection of substitute teachers, and expanding its affirmative action program.

The district established as a major goal of the Personnel Services Division for 1980-81 the development of a system of evaluation to ensure timely, accurate and effective evaluation of all district personnel. In this effort, the division developed a due process handbook for both certificated and classified managers in dealing with evaluation and discipline of employees. Under the new system, all managers and employees are given formal, written evaluations annually by their immediate superior. Procedures to be followed are prescribed by Personnel and notices of evaluation schedules are distributed.

Personnel monitors the completion of evaluation and notifies divisions on a periodic basis of any evaluations outstanding. Seriously delinquent evaluations are reported periodically to the Superintendent and Associate Superintendent.

To improve the quality and effectiveness of its substitute teacher pool, the district has worked in recent years to refine its selection and evaluation procedures for these employees. A panel of administrators interview applicants for substitute teacher positions on a monthly or as needed basis. All new substitutes receive a handbook outlining his/her responsibilities. All substitutes are evaluated on a periodic basis. Any substitute receiving a less than satisfactory evaluation is given a warning. A second negative evaluation is followed up with a personal interview. Three negative evaluations result in immediate dismissal.

The district has made significant progress in the affirmative action area. It has refined recruiting procedures, including greater centralization of hiring, and has carried on an active program to enlist the support of managers and administrators and to monitor progress. This year the district has set as the first goal in Personnel Services the development of realistic long-term goals and timelines for recommendation to the Board.

V. OPERATIONAL PLANNING AND BUDGET DEVELOPMENT

Document Improvements

By order of the Board, the staff has made a major effort in the past two years to simplify budget documents and increase their clarity. In 1980-81 the administration developed a new monthly financial report to provide better and more timely information to the Board and the public. The report it replaced was issued quarterly only and was organized in a complex format more suited to CPA's than to Board members and the public. The new report gives the Board and the public a clear, up-to-date picture of the district's finances, including budget and prior year data, actual revenue and expenses, encumbrances, average daily attendance (ADA) and the status of current legislation.

The administration has also made substantial progress in simplifying and clarifying the presentations in the various budget documents issued during the year in the process of developing a final budget. The budget process begins in September and ends in September of the following year with the publication of the Final Budget. The principal documents include the Financial Projection (for the coming fiscal year), the Tentative Budget, prepared by the administration for presentation to the Board of Education, the Publication Budget, issued after the Board has reviewed and made amendments to the Tentative Budget, and the Final Budget, issued at the beginning of the fiscal year and incorporating any further changes made by the Board.

Budget Policies

The Board has invited broad community participation in the budget planning process and has emphasized an open book policy. Board policy requires that state funded special programs live within their reimbursement revenue. This, however, is not always possible when the state mandates requirements on local districts, but does not provide sufficient funds to pay for them. Last year, for example, the state failed to provide sufficient funding for the special education program for handicapped children. The result was a shortfall in many districts. In San Juan the deficit amounted to \$1.207 million. The district squeezed expenditures by \$400,000 in the program, leaving a shortage of \$800,000 which the district's general fund had to supply. This year the district is faced with using up to \$600,000 of general fund money to meet the mandated requirements, since again the state has underfunded the program.

The 1981-82 Budget

In reviewing the 1981-82 Tentative Budget the Board set a target for budget cuts of \$5 million. It succeeded in cutting approximately \$3 million. The Publication Budget, which details the Board's actions, lists 46 items recommended for reduction by Superintendent Stewart. The Board approved most of them. They include closing the four K-6 schools (\$450,000), reducing custodial service to every other day cleaning (\$661,000), eliminating opportunity school at high school level (\$302,000), reducing management support personnel (\$138,000), cutting transportation costs (\$135,000) and reducing one intermediate and six high school special entitlement teachers (\$119,000).

Under instruction by the Board, the Superintendent also listed 51 other reduction items, which he did not recommend, amounting to potential savings

of another \$3 million. The Board overruled him on two items: transferring the responsibility for special education transportation to the County Office of Education (\$425,000, to be realized in 1982-83) and reducing central office supplies by 6% (\$8,000).

Naida West, President of the San Juan Board of Education, emphasized that these cuts could not have been made without involvement and support of the community. As we have commented elsewhere in this report, involving the community in the decision-making process of both the Board of Education and the administrative staff is a hallmark of the San Juan District operation.

Altogether, the \$3 million in budget cuts resulted in the elimination of 96 employee positions--8 management, 16 certified (teachers) and 72 classified (non-teachers, i.e., instructional aides, health assistants, accountants, clerks, craftsmen, custodians, bus drivers, etc.).

This year the district negotiated salary increases of 6.75 percent for both certified and classified employees. The increases will cost the district \$4.96 million. As a result of the budget cuts, however, the total increase in the 1981-82 budget over 1980-81 actual expenditures is \$4.1 million, or 3.7 percent. A national economic forecasting firm has estimated that state and local governments generally will experience price increases of 8.6 percent during fiscal year 1981-82. By this measure, the increase in the San Juan School District budget is five percentage points below expected inflation levels.

Declining Enrollment and Increasing Employment

A key problem in the budget area involves the phenomenon of declining enrollment in conjunction with increasing employment. While the experience is not unique to San Juan, analyzing the effect on the San Juan budget provides an excellent example of what has been occurring in the educational establishment in the past decade.

From 1970 to 1980 student enrollment in San Juan dropped from 53,623 to 45,095, a decrease of 8,528, or 16 percent. In the same period total employment increased from 3,093 to 4,082, an increase of 989, or 32 percent. (See Attachment A) With the decrease in enrollment, one would expect a corresponding decrease in the workload. Why then has employment increased --and increased substantially--rather than decreased?

The answer is that despite the decrease in enrollment, the workload in San Juan, and in all school districts in California, has increased rather than decreased. The workload has increased because of the massive expansion in recent years of special educational programs mandated by the federal and state governments, in particular programs for the educationally disadvantaged and the poor.

A recent report by the California Association of School Business Officials points out that in 1950 there were three mandated and authorized programs for elementary schools.

Educable Mentally Retarded
Trainable Mentally Retarded
Physically Handicapped

By 1980, the list had grown to the following:

Bilingual/Bicultural
Breakfast Program
Childrens' Center
English as a Second Language
Elementary Counseling
Environmental Education
ESEA Title I Centers
Headstart
Indian Center
Libraries

Master Plan for Special Education
- Communicable Handicapped
- Physically Handicapped
- Learning Handicapped
- Severely Handicapped
Mentally Gifted Minors
Migrant Education
Miller/Unruh Reading
Nursing Services
Psychological Services
Pre School
Refugee Program
School Improvement Plan

All these programs require people to administer them and facilities to house these people and their students--special teachers, teachers' aides, consultants, counselors, nurses, and psychologists, as well as accountants, clerks and auditors to make out the grant applications and prepare the variety of required compliance reports and audits.

If we look at Item E in Attachment A, covering employment over the past ten years in San Juan, we can begin to understand how the expansion of special programs has affected the district's budget.

From 1970 to 1980 regular classroom teachers decreased from 1,944 to 1,673, a decrease of 14 percent. This approaches the 16 percent decline in enrollment. In contrast, categorical/special resource teachers (Title I and school improvement plan, special education, reading, gifted and talented program, fine arts, etc.) increased from 170 to 441, an increase of 159 percent. To put it another way, the student/teacher ratio for regular classroom teachers in 1970 was 1:28 and a fraction less in 1980. If, however, you add the 441 categorical/special resource teachers, the ratio in 1980 drops to 1:21.

Attachment A also shows that pupil services employees (nurses, therapists, counselors, etc.) increased from 107 to 203, an increase of 90 percent, in the ten years, and classified employees (non-teaching) increased from 720 to 1,607, an increase of 123 percent.

At the public hearing conducted by the Commission to hear testimony from district officials on the operation of the district, Superintendent Stewart testified that 20 to 25 percent of the district budget is devoted to the administration of these mandated special programs. While most of the cost is funded by the federal and state governments, Dr. Stewart indicated that simplification of the rules and regulations governing them could reduce administrative costs substantially. The district officials, he said, do not oppose these programs, although they might like to change priorities. What they are most strongly opposed to is the mass of requirements specifying in detail how the programs should operate and the excessive amount of paperwork involved in filling out applications and completing compliance reports. Superintendent Stewart asserted that--at least for districts that have demonstrated effective management--it is time for the Legislature to cut the umbilical cord. Allocate the funds, as appropriate, and hold the districts accountable, but give the districts the flexibility to operate the programs suitable to the needs of the district.

Mike Roberts, President of the San Juan Teachers' Association testified that his union and the administration had just established an Evaluation and Paperwork Committee, with three representatives from the union and three from the district. It is charged with the responsibility of reviewing both the regular and special educational programs, with the objective of streamlining the evaluation process and eliminating unnecessary and duplicative paperwork.

Les Halcomb, Executive Director of the Commission, pointed out that at the request of the legislative leadership the Commission has initiated a study of the State Department of Education. An integral part of the study will be an investigation of the administration and costs of the special education program.

VI. MANAGEMENT INFORMATION SYSTEM.

The district has a batch driven, automated management information system, with equipment operated on a three-shift, five-day week. In July 1980, the district issued a request for proposal (RFP) to provide additional capacity and an interactive capacity. The RFP was excellently prepared, covering every detail of the district's plans and requirements. The district's current computer, a Univac 9480 system, falls short of satisfying new user requirements and on-line application projects for the future.

A new computer is required to expand the system into a decentralized, multi-functional Data Base Management System over a period of five to seven years.

The district selected a Univac 1100/60 system, which is due to go on-line in the first quarter of 1982. The new capability will provide management with more timely information on student and employee records, encumbrances and expenditures, equipment and facilities maintenance, and pupil transportation. The goal is to reduce hardware, software and maintenance costs by 25 percent, now at a level of approximately \$1.74 million.

VII. EXPENDITURE CONTROL AND REPORTING

Control System Improvements

In 1980-81 the district initiated an extensive campaign to tighten control over expenditures.

The district now uses a basic encumbrance procedure which requires all purchases to be posted against budget allotments prior to issuance. The district has a centralized position control and employee selection process. All substitute teacher hiring and recordkeeping have been centralized this year to improve control over sick leave and substitute expenditures.

In April 1981, the administration implemented a new automated system for payroll and personnel information. The old system had eleven separate files no on-line capability for accessing and changing information, and no cross-checking capability to ensure that the information was up-to-date and compatible among the different files. The new system combines all information in one file, provides easy access and change capability, and insures that the information on each employee is not contradictory.

The district also designed and implemented an automated system which links salary costs to specific positions. The district can now project salary costs based upon manpower requirements for any function or program.

In 1980 the district initiated an energy conservation program with a goal of reducing utilities consumption by 15 percent. The General Services Department conducted an audit of the district energy conservation devices and all telephones. It then instituted a reporting system covering usage of electricity, heating gas and telephone by site, measured against the year-to-date data of the previous year. The object of the program was to bring the cost of utilities resources into balance with the availability of dollar resources. The district exceeded the goal of 15 percent reduction by seven percent.

Control Systems in Development

Developing accurate reporting of average daily attendance figures (ADA) is extremely important to any local district. State funding allocations for regular classroom teaching, as well as for many of the special educational programs, is based on ADA. Currently, San Juan has a manual system which involves much handposting, is slow and is very difficult to check for accuracy. According to district managers, the district can never be certain that all students have been counted, until it develops an automated system which will provide cross reference between ADA records and the master census file of all enrolled students.

The district, therefore, set as a major goal for 1980-81 establishing procedures to improve ADA reporting for all schools and the Business Services Attendance Department in anticipation of automating the system when the new computer goes on line in 1982. In 1980-81 the administration completed a new manual incorporating improved procedures and reducing duplication of effort between the Business Office and the schools.

For 1981-82, with the new computer due on-line in the first quarter of 1982, the district has set as its first goal the automation of attendance at all K-6 and 7-8 schools.

During 1980-81 the district also established and implemented a program to reduce Workers' Compensation claims and costs. The position of Workers' Compensation specialist was established in the Risk Management Department to process all claims. Claims procedures were reviewed and a program was initiated to offer site instruction to employees for more efficient processing of claims.

In 1981-82 the district goal is to prepare a plan for insurance coverage at less cost and to investigate whether self-insurance programs will provide cost savings. It is also initiating a program to train district employees to understand and employ safety procedures in their daily tasks with the objective of reducing accidents and accident claims.

As a result of the public auditor's report of 1980, the district has initiated a program to tighten up and reduce the investment in inventories by 50 percent. The audit report cited no exceptions to responsible accounting of district funds.

VIII. MAINTENANCE AND OPERATIONS

Workforce Reduction

As we noted in Section V, one of the major items involved in cutting the 1981-82 budget by \$3 million, was reducing custodial service to every other day cleaning. This action eliminated 50 custodial positions. Savings are estimated at \$661,000 annually.

The district anticipated a small increase in maintenance costs. To date the district reports no problems or complaints from teachers and other employees and no noticeable increase in maintenance costs.

Employee Morale

On the other hand, union officials report that because of layoffs and low salaries, employee morale is low and turnover is high in the maintenance area. Absenteeism also has been running at eight percent or higher. The district has set as a goal for 1981-82 reducing it by 4 percent.

The Director of Maintenance and Operations has been in his job less than three months. He is aware of the problems and is working to resolve them.

Deferred Maintenance and Surplus Property Survey

The district has a backlog of deferred maintenance of \$18 million. The annual allocation in recent years has been around \$260,000. A recent staff report recommends selling 191 acres of excess and unused land at 54 school sites. The report estimates that revenues will amount to \$5.7 million, or approximately \$550,000 a year. In five years this amount, together with AB 8 matching funds, would bring deferred maintenance over the five year period to a manageable level, according to the report.

The report recommends the following procedures:

1. Sell, following appropriate legal procedures, approximately \$1 million worth of property each year.
2. Place the monies received in the general fund and transfer these monies from the general fund to the district Deferred Maintenance account.
3. Increase the district's share of AB-8 Deferred Maintenance funds to the maximum allowable amount (district share to about \$550,000). This will permit the district to obtain the maximum amount available with the state share, approximately \$1,100,000 total.
4. Reduce, over the next four years, the district's Deferred Maintenance to a manageable level.
5. The added funds generated and not matched by the state will be used for major maintenance not authorized by the state (i.e., sprinkler system repairs).

Included in the above procedures would be appraisals, employment of a broker, and marketing of the properties.

The report concludes with this cautionary observation: "A great deal of effort will be necessary to complete this project, however, this appears to be the only area whereby the district could possibly obtain the necessary funds to bring about correcting the critical and major maintenance needs facing San Juan Unified School District."

At the public hearing on November 11, Commissioner Manning Post, who had reviewed the report, estimated that perhaps 75 percent of the acreage could be sold. The remaining 25 percent either did not appear attractive for selling or, if sold, could detract from the school's site capabilities and amenities. Superintendent Stewart agreed, but emphasized that the study was a preliminary survey and the objective was to identify all potential surplus property.

Gary Gillmor and Associates, the firm hired to provide consultant services on lease or sale of four school sites, is also assigned to assist the district in identifying and selling all property which can appropriately be sold. Currently, the firm is surveying each parcel to determine its potential for selling.

IX. TRANSPORTATION

Transportation Budget and State Funding Formulas

The district operates a fleet of 195 buses and vans. Next to Los Angeles this is the largest school busing operation in the state. The operation is large because the San Juan District covers 75 square miles in Sacramento County and the regional transit service in this area is limited.

The total transportation budget for 1981-82 is \$4,441,568. The major part of these funds are reimbursed by the state. The state uses two reimbursement formulas--one for special education students (i.e., the handicapped) and one for regular K-12 students. The special education formula is 80 percent of the prior year's approved cost for special education transportation. The regular K-12 formula is reimbursement for all costs up to 106 percent inflation factor over two years, which does not nearly match fuel price increases, salary increases, and other cost increases.

San Juan expects to receive a reimbursement this year of \$1,378,000 for special education transportation and \$2,370,000 reimbursement for regular transportation. The difference between the total reimbursement of \$3,748,000 and \$4,441,568, or \$693,568, is paid by the District from its general fund.

Cost Reduction Program

Concerned with reducing this drain on its general fund, the district commissioned a pupil transportation study in 1981 by Price Waterhouse Company and Edgar Management Consultants. The study recommends changes in routing and corner stops, vehicle replacement, parts inventory control, and fringe benefits. Its most significant recommendation is initiation of a parent pay program. Savings are estimated at \$450,000 to \$900,000. By far the largest savings would be realized, according to the consultants, by instituting the parent-pay-program. Savings on this item, they estimated, would amount to \$340,000 to \$537,000.

Existing state law, passed three years ago, allows for parent pay for school transportation, and a number of districts have initiated parent pay plans. However, the law is due for sunset in June 1982. Therefore, unless new legislation is passed, the potential savings are reduced to a range of \$115,000 to \$394,000.

When the new computer is on-line, the district plans to automate bus scheduling, which it estimates will result in a fleet reduction of 25 to 30 percent.

A major goal of the district for 1981-82 is to reduce the transportation budget by at least \$250,000. Rising costs, the district report states, must be curtailed in order to balance the district's transportation budget.

X. COLLECTIVE BARGAINING

Management-Union Relations

Both district and union officials report that management-union relations and communication have improved significantly in the past two years. The district has encouraged participation by employees and their representatives in policy formulation, budget development, and personnel procedures. Union representatives sit on the Superintendent's cabinet, together with the President of the PTA Council and district officials.

The district stresses mutual problem solving in the negotiating process. For example, in the negotiations this year, rather than debate issues involving performance evaluation procedures and transfer policies for teachers, the district and the teachers' union set up a joint committee which worked out policies and procedures agreeable to both sides.

In addition, the Board of Education in recent years has demonstrated a concern for protecting employee rights and bringing employees into the decision-making process.

In 1975 the Board approved a number of agreements regarding certain employee rights and privileges, such as recognition of the Certificated Employees Council as exclusive agent for all certificated personnel, leave of absences for union presidents, use of buildings, use of mail service and mail boxes, and so on. One article prescribed joint decision-making between school principals and the teaching staff on 1) the use of money, 2) use of volunteers or aides, 3) student discipline and policies, and 4) teacher assignments.

Bargaining Problems

Nevertheless, despite the improvement in management-union relations, the negotiating process remains a high risk area for management=employee conflict and work stoppage. Until the state budget is adopted--usually only days before union contracts expire--neither management nor the union is in a position to reach agreement, since they do not know what funds are available.

As a consequence, negotiations in past years have rarely been smooth. In 1977 teachers struck for four days. Each year since then negotiations have gone to impasse and mediation, generally resulting in delayed contract settlement. This year the contract was settled before the school year began--the first time since 1977.

Assemblyman John Vasconcellos and others have said that the problem resulting from adoption of the state budget only days or weeks before the end of the contract year could be resolved by moving the district fiscal year forward six months to the calendar year.

There would be difficulties in making this transition. The districts would have to make 10-month projects for the first year and a number of changes would have to be made in salary schedules. In addition, the school year from September to September would not coincide with the fiscal year from January to January. This would cause problems in conducting operational planning of school programs and fiscal planning of budget allocations and expenditures.

At the public hearing on November 11, Mike Roberts, President of the San Juan Teachers' Association, commended district management for the progress that has been made in the last two years in union-management relationships. The administration has been open and cooperative. The bargaining has been hard and he has not always been happy about results. But he stressed that the bargaining has been fair and conducted in good faith. Any appropriate information the union requests is given to them promptly. Since the strike in 1977, Roberts states, union-management relations have improved 100 percent.

It appears, therefore, that in lieu of changes at the state level, the district's policy of open and responsive relations with the unions provides the best insurance that both district and union interests are negotiated on an equitable basis.

XI. COMMUNITY INVOLVEMENT

The district stresses formal community participation in all of its activities. To provide structured community input, the Board has established six citizen advisory committees:

- Budget
- Multi-cultural and Intergroup Relations
- Curriculum and Standards
- Facilities and Transportation
- Legislation
- Pupil Behavior and Discipline

Peggy Dial, President of the San Juan PTA, told the Commission, that the present Board, in particular, has continually referred problem issues to these committees. It is not, she emphasized, a showcase structure. For example, the school closure decisions were referred to the Facilities and Transportation Committee for review, and both the Committee and the Community Assessment Teams from the beginning played a major role in the school consolidation study.

Most recently, Mrs. Dial reports that the Pupil Behavior and Discipline Committee, for which she serves as chair, developed a uniform criteria on suspensions and expulsions to be used in all schools throughout the district.

The Board also appoints ad hoc committees from time to time on particular problems; e.g., Graduation Requirements Committee.

A Principals and Presidents Council, consisting of the ten high school principals and presidents of the PTA or Parents Club, meets monthly to review problems, make recommendations, and prepare presentations to the Board of Education. An Intermediate Schools Parents and Administrators Council performs a similar function for 7-8.

The Superintendent is a member of the PTA Council, regularly attends its monthly meetings, and is often on the agenda. The Associate Superintendent meets each Friday with parent representatives from all schools located within the attendance area of two high schools.

SAN JUAN UNIFIED SCHOOL DISTRICT - DESCRIPTIVE INFORMATION

A. DISTRICT POPULATION

Year 1980	271,000	Year 2000 (Projected)	290,230
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B. DISTRICT AREA

75 Square Miles

C. BUDGET

<u>1980-81 Actual Total Expenditures</u>	<u>1981-82 Final Budget</u>	<u>\$ Increase</u>	<u>% Increase</u>
\$112,898,878	\$117,047,108	\$4,148,230	3.7%

D. FACILITIES

Total Number of Buildings	82	Total Value	\$300,000,000
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Number of Schools

<u>K-6</u>	<u>7-8</u>	<u>9-12</u>	<u>Continuation</u>	<u>Special Education</u>	<u>Adult Education</u>
48	11	10	3	2	3

E. EMPLOYMENT (Full Time Equivalent)

November 1, 1970October 20, 1980

Certified Employees

K-12 Teachers		
Regular Classroom	1943.7	1673.2
Categorical/Special Resource	<u>170.0*</u>	<u>441.4</u>
Total	2113.7	2114.6
Pupil Service Employees**	106.8	202.7
Administrative Employees	152.1	157.5
Classified Employees	<u>720.3</u>	<u>1606.7</u>
Total	3092.9	4081.5

*Estimated

**Nurses, speech therapists, librarians, counselors, psychologists

F. TOTAL STUDENT ENROLLMENT

		<u>Increase/(Decreased)</u>	<u>% Change</u>
1970-71	53,623		
1980-81	45,095	(8,528)	(15.9)
1983-84 (projected low)	43,556	(1,539)	(3.4)
1997-98 (projected high)	48,213	4,657	10.7
2000	47,515	(698)	(1.4)

G. CLASSROOM CAPACITY - Before School Closures in 1981

	<u>Capacity</u>	<u>Actual Enrollment</u> (1981)	<u>Difference</u>	<u>% Excess</u>
K-6	29,004	21,866	7,138	24.6
7-8	8,093	6,716	1,377	17.0
9-12	19,123	15,562	3,561	18.6
Total	56,220	44,144	12,076	21.5

H. CLASSROOM CAPACITY - After School Closures

<u>Nov. 1981</u>	<u>Capacity</u>	<u>Actual Enrollment</u> (1981)	<u>Difference</u>	<u>% Excess</u>
K-6 Permanent Facilities	21,230			
Portable Facilities	2,870			
Total	24,100	21,866	2,234	9.3%
7-8 Permanent	7,299			
Portable	670			
Total	7,969	6,716	1,253	15.7%
9-12 Permanent	17,159			
Portable	990			
Total	18,149	15,562	2,587	14.2%
Total Permanent	45,688			
Portable	4,530			
	50,218	44,144	6,074	12.1%

SAN JUAN UNIFIED SCHOOL DISTRICT SCHOOL ENROLLMENT
SEPTEMBER 15, 1981

ELEMENTARY SCHOOLS

1. Lichen	854	25. Littlejohn	431
2. Sunrise	764	26. Cameron Ranch	417
3. Kingswood	747	27. Edison	416
4. Arlington Heights	658	28. Carmichael	410
5. Woodside	638	29. Coleman	404
6. Oakview	613	30. Dewey	397
7. Coyle Avenue	604	31. Cottage	391
8. Deterding	581	32. Green Oaks	378
9. Twin Lakes	567	33. Schweitzer	352
10. Grand Oaks	553	34. Cambridge Heights	351
11. Skycrest	549	35. Thomas Kelly	350
12. LeGette	544	36. Fair Oaks	345
13. Mariposa	538	37. Del Dayo	338
14. Pershing	536	38. Orangevale	330
15. Mariemont	514	*39. Starr King Regular	325
16. Citrus Heights	498	40. Greer	323
17. Northridge	490	41. Whitney Avenue	318
18. Roberts	489	42. Dyer Kelly	315
19. Billy Mitchell	474	43. Mission Avenue	307
20. Peck	469	44. Dowan	294
21. Sierra Oaks	468	45. Creekside	292
22. Del Paso Manor	464	46. Palisades	279
23. John Holst	460	*47. Howe Avenue	278
24. Garfield	439	48. Pasadena	233

*K-6 enrollment of K-8 School

INTERMEDIATE SCHOOLS

1. Andrew Carnegie	990	7. Winston Churchill	579
2. Louis Pasteur	980	8. Arcade Fundamental	520
3. Will Rogers	831	9. Jonas Salk	501
4. Sylvan	682	*10. Starr King Regular	498
5. John Barrett	641	*11. Howe Avenue	349
6. Arden	624		

*7-8 portion of K-8 Schools

HIGH SCHOOLS

1. Bella Vista	1825	6. La Sierra	1267
2. Del Campo	1789	7. Encina	1250
3. El Camino	1649	8. Rio Americano	1193
4. Casa Roble	1589	9. Mira Loma	1183
5. San Juan	1587	10. Mesa Verde	1056

SAN JUAN UNIFIED SCHOOL DISTRICT
SECONDARY SCHOOLS DIVISION
ENROLLMENT IN EACH HIGH SCHOOL FROM 1975-1981

<u>School</u>	<u>1975-76</u>	<u>1976-77</u>	<u>1977-78</u>	<u>1978-79</u>	<u>1979-80</u>	<u>1980-81</u>	<u>9/17/81</u>	Increase (Decrease)
Bella Vista	2,080	2,122	2,169	2,106	1,864	1,884	1,825	(255)
Casa Roble	1,815	1,703	1,703	1,758	1,665	1,592	1,589	(226)
Del Campo	2,239	2,187	2,167	2,005	1,917	1,852	1,789	(450)
El Camino	1,643	1,579	1,537	1,488	1,492	1,541	1,649	6
Encina	1,744	1,700	1,619	1,602	1,502	1,355	1,250	(494)
La Sierra	2,027	1,908	1,776	1,593	1,480	1,361	1,267	(760)
Mesa Verde	1,095	1,430	1,460	1,424	1,271	1,215	1,056	(39)
Mira Loma	1,777	1,692	1,539	1,483	1,380	1,228	1,183	(594)
Rio Americano	1,733	1,673	1,646	1,656	1,464	1,257	1,193	(540)
San Juan	<u>1,817</u>	<u>1,744</u>	<u>1,736</u>	<u>1,782</u>	<u>1,754</u>	<u>1,612</u>	<u>1,587</u>	<u>(230)</u>
Total	17,970	17,738	17,352	16,897	15,789	14,897	14,388	(3,582)

SAN JUAN UNIFIED SCHOOL DISTRICT

MEMORANDUM

TO: Dr. Fred J. Stewart, Superintendent

DATE: October 8, 1981

FROM: A. J. Burke, Assistant Superintendent
Business Services Division

SUBJECT: Goals and Objectives for 1981-82

The 1981-82 goals for the Business Services Division are designed primarily to improve efficiency and/or reduce costs. These goals reflect the ongoing nature of previously established goals as well as the establishment of new goals for this school year. Some of the goals can be accomplished in one year; others will require up to two years.

Our major goals for the 1981-82 school year are also the goals of the Governing Board. Specifically, these are risk management cost reductions, cost savings in transportation, development of the long-range housing plan, completion of the AB-8 application for new construction, construction of the Lichen multipurpose building, and continued energy conservation. Goals for the reduction of employee absenteeism have also been established for three areas of the Business Services Division: Data Processing, Maintenance and Operations, and Transportation.

The goals for the division are as follows:

Accounting Services

Consolidate all district accounting functions together in a central location under the supervision of the Accounting Department.

Attendance

Automate elementary and intermediate attendance accounting.

Budget Development and Control

Link ADA projections with enrollment projections.
Consolidate all capital outlay expenditures into a single budget category.

Data Processing

Convert to the new Univac computer system and train employees for operation of new equipment.

Complete conversion process to enable all high schools to be on line with STARS Attendance System by opening of school 1982-83.

Reduce employee absenteeism.

Facilities

Establish centralized plans file.

Complete AB-8 application and impact application plan. Complete long-range plan for housing needs.

Construct multipurpose building at Lichen.

Food Services

Control labor and food costs; reduce paperwork as a result of reduction in program.

General Services

Continue energy conservation program; complete inventory of District equipment.

Develop and implement purchasing calendar by 6/30/82.

Internal Auditor

Continue review of District student body accounting procedures; coordinate audits with external auditing firm.

Maintenance and Operations

Complete inventory.

Reduce employee absenteeism.

Reduce accidents.

Risk Management

Prepare plan for insurance coverage at less cost.

Reduce workers' compensation claims.

Transportation

Write driver's handbook for major operating procedures; establish a mobile training bus.

Implement Board transportation policies.

Reduce absenteeism.

AJB:dh

SAN JUAN UNIFIED SCHOOL DISTRICT

GOALS AND OBJECTIVES

DEPARTMENT/SCHOOL Budget Development
and Control

1981-82
School Year

PAGE 1 OF 1

DIVISION Business Services

ADMINISTRATOR W. C. Pieper

GOAL: To consolidate all capital outlay expenditures into a single budget category

NEEDS STATEMENT: The Board of Education has requested that this procedural change be implemented in 1982-83. It will eliminate potential departmental overlap, enhance budget control, and ensure that district-wide needs are considered in the allocation process.

Objective/Activities	Evaluation Product	Responsible Person	Target Date	Event Schedule											
				J	A	S	O	N	D	J	F	M	A	M	J
3.0 Consolidation of Capital Outlay Budgets															
3.1 Review 1980-81 capital budgets and identify one-time and/or contractual obligations as opposed to ongoing discretionary allocations.	Report	Pieper/Mearns	11/15/81					▲							
3.2 Develop ratios to assist in budgeting for discretionary capital outlay items.	Proposal	Pieper/Mearns	11/30/81					▲							
3.3 Refine above proposal and secure Executive Staff approval.	Procedure	Pieper/Executive Staff	12/31/81						▲						
3.4 Modify budget summary program to display data in keeping with approved procedure.	Sample Reports	Pieper/Newcomb	2/28/81								▲				
3.5 Include ratios and consolidated capital outlay accounts in 1982-83 Tentative Budget for Board review and approval.	Tentative Budget	Pieper/Mearns	5/31/82											▲	

GOAL: To select and implement a replacement computer system by September 30, 1981 as evidenced by the Board of Education minutes and user acceptance of the new system.

NEEDS STATEMENT: The current Univac 9480 computer system provides services to 32 separate departments, using 42 different software systems. This computer system is at its fullest capacity, however and falls short of satisfying new user requirements and on-line application projects for the next few years.

Objective/Activities	Evaluation Product	Responsible Person	Attainment
1.0 To select and implement a replacement computer system by September 31, 1981.			
1.1 Release RFP to bidders	RFP	Winchell	Completed on Schedule
1.2 Bidder's Conference	Mtg. Notes	McFadden	Completed on Schedule
1.3 Date for bidder's questions to be submitted to District	Memo	Purchasing	Completed on Schedule
1.4 Complete conversion requirements	Req. Document	Winchell	Completed on Schedule
1.5 Last addenda to be furnished to vendors.	Addenda	Purchasing	Completed on Schedule
1.6 Vendor proposal submission.	Bid Response	Purchasing	Completed on Schedule
1.7 Preparation and organization of conversion.	Memo	Winchell	Not Complete
1.8 Begin vendor oral presentations.	Mtg. Notes	Winchell	Complete
1.9 Superintendent's cabinet briefing (status report).	Report	Winchell	Complete
1.10 Selection of vendor's for benchmark.	Report	Winchell	Complete
1.11 Initiate benchmark.	Memo	Winchell	Complete
1.12 Notify vendors of bid award.	Letter	McFadden	Complete
1.13 Final cabinet briefing. Status report prior to acquisition.	Report	Winchell	Complete
1.14 Complete conversion plan.	Plan	Winchell	Not complete
1.15 Finalize contract specifications	Contract	McFadden	Complete
1.16 Final financing arrangements.	Memo	Pieper	Complete
1.17 Board of Education approval	Board Minutes	Winchell	Complete
1.18 Select new computer site.	Memo	Chang	Complete
1.19 Moratorium on new development	Memo	Winchell	Complete June 1, 1981
1.20 Begin training for new computer	Class	Winchell	Complete June 1, 1981
1.21 Begin computer conversion	Report	Winchell	
1.22 Begin site modifications	Plans	Winchell	Scheduled for August 15, 1981
1.23 Complete site modifications	Signoff	Winchell	Scheduled for October 15, 1981
1.24 Planned installation date.	Acceptance Letter	Winchell	Scheduled for November 1, 1981

